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800-424-2938

www.BNAsoftware.com

BNA Software offers multiple options for sales and use tax compliance, with both CD-based and web-based programs that offer forms preparation or rate lookup. The vendor's primary products for sales and use tax are the BNA Sales & Use Tax Rates and BNA Sales & Use Tax Forms, which work separately to provide a comprehensive manual sales and use tax compliance system that supports all U.S. states, counties, cities and other jurisdictions with sales taxes.

Basic System Functions

Each of the programs focuses on a different area of the sales and use tax process and, therefore, offer different interfaces and core feature sets. For the web-based Sales and Use Tax Rates program, the main screen is focused on search activities, with brief "getting started" tips noting the basic steps of the search utility. Searches can be by Zip Code, city, county, state or all, or users can browse by various jurisdictions. Other core program features are accessible across the top via tabs for Favorites, which allow for saving prior searches, plus What's New and the Rates Exporter, which allows users to create custom lists of the taxing jurisdictions for which they need rates. The program then automatically creates a rate table update file and emails it to the business at whatever schedule they need, whether monthly, quarterly or on any other timeframe. This allows users to automate rate table generation and receive an Excel file that can be imported into virtually all accounting programs.

The Sales and Use Tax Forms application, which is BNA's core compliance system, appears more like a traditionally installed program, with feature icons and pull-down menus across the top of the main screen, but providing web-based integration

to automate and maintain program, form and jurisdiction updates. By dividing the

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well as alerts to rate changes. 4.5

Compliance Capabilities

The BNA Sales and Use Tax Rates system offers always up-to-date rates lookup for all sales taxing jurisdictions in the United States, with the ability to save searches, view historical and pending future rates, and export data into various formats. The Sales and Use Tax Forms program provides computerized preparation for all of the jurisdictions, with more than 3,400 forms, plus options for managing exemption certificates and blank general business templates for business registrations, powers of attorney and other issues.

During preparation, returns are presented as exact replicas of actual state forms, with the program performing calculations as data is entered. The system maintains profiles for each client/business entity, along with the professional preparer, allowing basic information to be automatically populated into returns.

BNA does not offer any electronic filing or payment options; the programs are solely for paper-based filings or for integration of rate tables into other programs, or for business users who generate the forms and reports through the program and then use the websites for the taxing authorities at each of the states with liability. Tax rates in the online system are automatically and constantly updated by staff at BNA with no action required by the user. 3.5

Integration/Import/Export

All state, local and other taxing jurisdiction forms and instructions can be output as PDF files or viewed on-screen. Tax tables can be automatically generated by the Rates Exporter, which sends the user the tables for the specific jurisdictions needed. The tables can be formatted as text, PDF and Excel, allowing for import into all common

accounting and e-commerce programs. Rate table exports can also be scheduled to be

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instructions or overriding calculated entries. Both also include a traditional indexed Help utility. The BNA support website includes tips, FAQs, training options and methods of contacting live technical support, which is included in system pricing.

4.25

Summary & Pricing

Both BNA Sales & Use Tax Rates and Sales & Use Tax Forms offer intuitive interfaces that make it easy to get to primary functions and either look up sales tax rates or prepare forms. With individual programs for rates and compliance, BNA's approach to sales and use tax is different than many of the other systems on the market, but it provides small businesses with a very cost-effective way to get rate tables for all U.S. jurisdictions. And the Rates Exporter makes it easy to automate the generation of those tables and import them into accounting systems. The compliance system still needs the addition of electronic filing and payment options, but overall, the BNA programs provide strong capabilities. Each program costs \$925 each per year, inclusive of technical support.

2010 Overall Rating 4.25

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